

Insure Montana Goals		Agency/Program #: 3401-03-I1
		Division: Insurance Division
		Program: Insure Montana
Agency Name:	State Auditor's Office	
Agency Contact:	Jan Van Riper	444-2755
LFC Contact:	Representative Taylor, Representative Sesso	
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Program or Project Description:

Insure Montana is the Small Business Health Insurance Program passed during the 2005 Legislative Session. The program has two primary components: to provide refundable tax credits to small businesses that are currently providing group health insurance to their employees, and to provide premium assistance and incentive payments through our purchasing pool or a qualified association plan to previously uninsured businesses.

Appropriation, Expenditure and Source					
Fund Name:	2008		2009		Approp & Expenditure numbers are as of October 31, 2007
	Approp.	Expended	Approp.	Expended	
General Fund					
State Special	4,371,318	32,765	4,375,203		
Federal Funds					
Total:	\$4,371,318	\$32,765	\$4,375,203	\$0	

Goal(s):

Provide tax credits to small businesses that currently offer their employees health insurance, to prevent loss of health insurance coverage due to affordability.

Performance Measures :

Provide refundable tax credits for at least 700 businesses, or 5,000 lives on a yearly basis as measured by those businesses completing the annually renewal in October. Help maintain coverage for employees of small businesses who might otherwise lose coverage due to affordability.

		Completion Dates	
2009 Biennium Significant Milestones:		Target	Actual
1	Complete renewal including reverification of eligibility for the program.	10/31/2007	
2	Mail 2007 certificates to all eligible participants to allow them to claim the credit on their tax forms	1/31/2008	
3	Transfer funds to cover tax credits to the Department of Revenue		
4			
5			

Performance Report:

During the period of July through October 2007, the Insure Montana program added approximately 24 businesses to the program for a one-time tax credit with unused funds transferred to the program from the purchasing pool by the board. Additionally, renewal paperwork was mailed to all participating businesses on September 18, and due back by October 31. When these renewals are processed, program staff will determine if any or all of the 24 one-time tax credit businesses can be added to the program on an ongoing basis. The renewals will be processed by mid-January 2008 to allow mailing of the tax credit certificates by 1/31/08. Staff is also in contact with businesses as they report changes to their policy enrollments, and adjusts the business tax credits accordingly.

LFD Narrative:**EXECUTIVE CHANGES**

1. Changes to goals/initiatives –Yes, additional language to clarify the purpose of the tax credits was added
2. Changes to performance measures- Yes, additional language was added the performance measure now states Help maintain coverage for employees of small businesses, however the language does not include any measurements.

LFD ASSESSMENT

1. Goal is measurable within the biennium: Yes
2. Progress toward goals: On track, the SAO has completed mailing the renewal forms for business tax credits and is currently in the process of processing the requests.

APPROPRIATION ISSUES

1. Appropriation/expenditure provided - Yes
2. Other appropriation issues –

OPTIONS REGARDING THE GOAL/INITIATIVE AND PERFORMANCE MEASURES

The workgroup may wish to have SAO report back June 2008 on the number of businesses certified as eligible for tax credits and request performance measurements on maintaining coverage for employees of small businesses.



Version	Date	Author

Change Description